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## CUBA'S LIVESTOCK AND MEAT INDUSTRIES

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### Summary

Cuba normally is self-sufficient with respect to meat production, except for salt pork. Meat supply during the period 1943-45, however, was much less than consumer demand. Cattle numbers, depleted by exceptional droughts and by excessive slaughter, did not permit beef output to rise commensurately with the larger purchasing power of consumers. Imports of salt pork from the United States were not sufficiently large to augment the smaller supplies of beef and to meet the increased wartime demand for meat. As a result livestock prices have increased considerably.

Although Cuba's meat supply continued inadequate to meet domestic demand during the first quarter of 1946, it was more nearly adequate than in the previous two winters of severe droughts. Sporadic shortages of beef continue in Habana, even though actual market prices for cattle have increased. Likewise, supplies of imported pork products continue far short of demand.

Prepared in the Livestock and Wool Division from material requested from Foreign Service Officers. Based chiefly on information furnished by C. A. Boonstra, when Assistant Agricultural Attaché at Habana, and subsequent reports submitted by the American Embassy, Habana, Cuba.

Beginning July 1, 1946, current reports of this kind are issued within a new series designated Foreign Agriculture Circular and keyed to indicate the subject matter covered.



Cuba has much excellent range land, and cattle are raised and fattened on grass. The cattle industry is an important segment of the island's agriculture, and has good possibilities for greater development through improvement of breeds, feeds, and handling. Other livestock industries, including those of hogs, sheep, and goats, are relatively unimportant. They provide a large part of Cuba's comparatively small requirement for pork and mutton, but do not contribute significantly with respect to lard and wool.

Cattle numbers in Cuba decreased from 5.3 million at the beginning of 1941 to approximately 4 million in 1945, a drop of about 25 percent. Severe droughts during this period, together with excessive slaughter brought on by a strong domestic demand, were primarily responsible for reduction in cattle numbers. Nevertheless, Cuba with a population of almost 4.8 million people has somewhere around 4 million head of cattle, a relatively high ratio.

It is estimated that domestic livestock slaughter in 1945 provided approximately 310 million pounds of meat, of which 270 million pounds were beef. About 5.2 million pounds of salt pork were imported, so that the per capita consumption of all meat was near 66 pounds. This is less than half the annual per capita consumption in the United States. Meat consumption in Cuba at present would be greater if more supplies were available, as demand at current prices appears to be about 475 million pounds, or 100 pounds per capita.

Cattle slaughter during the 1939-43 period varied from 458,000 to 520,000 head annually, according to official figures.<sup>1/</sup> For the first quarter of 1946, the American Embassy estimated slaughter at 50,000 head per month, slightly more than the past two winters. Generally, the trend has been downward since 1941, but the rate cannot be definitely ascertained because cattle slaughter for consumption in Habana has been diverted considerably from the packing houses to small municipal slaughterhouses. The rate of slaughter, however, is estimated to be about 15 to 16 percent of the total numbers.

Because of relatively high cattle numbers, Cuba started to export fresh beef in 1936, and in 1941 this product increased sharply to 43 million pounds, and continued at this rate until early 1942. At that time an embargo was placed on meat exports to conserve supplies for domestic consumption.

The price of bulls and steers, in June 1946, was 8 cents per pound on the hoof, f.o.b. Camaguey, compared with about 4 cents a pound just prior to June 15, 1943 and less than 3 cents in 1941.<sup>2/</sup> The wholesale ceiling price of beef is 14.5 cents per pound (32 cents a kilogram), regardless of grade. Retail prices of beef, as of June 1946, were about 27 cents per pound for first grade and had increased 50 percent over the price in existence just prior to June 15, 1943.

<sup>1/</sup> These figures do not include all slaughtering, since farmers are exempt from paying the official slaughter tax, and in addition, there is some tax evasion.

<sup>2/</sup> Unless indicated, value and weight are expressed in United States units.

Hog production is a minor enterprise in Cuba, and annual output normally remains rather stable. The 1945 census, however, enumerated 669,373 hogs, which was a reduction of 22 percent from the official count of 856,754 at the end of 1940. The Ministry of Agriculture indicates that hogs not enumerated by the 1945 census may be 14.4 percent, which would bring the number of hogs in Cuba to 765,227 head. Informed observers estimate, however, that actual numbers are 900,000 to 1,000,000 head, and that this population has been fairly stable during the past decade. Feed is the principal limiting factor in Cuban hog production. Usually costs for domestic corn, imported grains, and other imported protein meals are too high relative to hog prices to permit fattening on such rations.

Hog slaughter has declined since 1942, but this represents a growing tendency of diversion of hogs to country slaughter. The Ministry of Agriculture published a hog-slaughter estimate of 131,232 for 1944, but these data included only packing plants. Cuban pork consumption during the past decade has varied between 40 and 50 million pounds annually. Imports of 5 to 10 million pounds are required annually to supplement domestic production.

Hog prices in 1940 were about 7 to 9 cents per pound, but have steadily advanced during the past 5 years. Present prices range from about 17 to 23 cents per pound for live hogs weighing 150 to 275 pounds. Any attempt at enforcing the ceiling price of 13.8 cents per pound (14 cents per Spanish pound) on Habana packers, has had the effect of diverting livestock to slaughterers on the outskirts of the city who pay higher prices.

Three types of demand for pork exist in the Cuban market. The first of these demands is for fresh pork from good meat hogs of 150 to 250 pounds. The second consists of packer requirements for similar hogs to be used for fat salt pork, salt pork, and cured hams. Finally, pigs of 2 to 4 months are in considerable demand for roast pig, used on special occasions.

In prewar years Cuba imported an average of 5 million pounds of salt pork annually to supplement domestic production of about 37.5 million pounds. These imports were largely from the United States. Imports rose to nearly 12 million pounds in 1944, but in 1945 fell to about 5.2 million pounds because of restricted supplies.

Cuba also imports large quantities of lard, and it is one of the principal items of import trade. The United States, as in the case of pork, is the principal supplier of lard to Cuba. In 1945 the United States supplied over 61 million pounds, or better than 99 percent of all lard imported. Lard imports from the United States averaged 54 million pounds during the 1937-41 prewar period.

Cattle-hide exports, prior to the war, amounted to about 250,000 skins annually, with two-thirds going to Germany. Since the beginning of the war, most of these exports (consisting of wet-salted hides), averaging approximately 1.3 million dollars per year, were delivered principally to the United States.

This report describes the general nature of the Cuban livestock industries, and serves as background information necessary for a better understanding of conditions affecting the United States market for pork and lard in Cuba. For complete discussion of Cuban Agriculture, see "The Agriculture of Cuba," by P. G. Minneman, Foreign Agriculture Bulletin No. 2, issued by the United States Department of Agriculture, Washington 25, D. C.



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CATTLE

General Situation

Cattle numbers in Cuba experienced a steady growth from less than 1 million in 1900 to more than 5 million in 1941.<sup>1/</sup> By 1932, cattle slaughter was sufficient to supply all Cuban beef requirements, and from 1936 to 1942, there was sufficient beef to permit exportation. In early 1943, however, slaughter failed to meet the domestic requirement, this being attributed to drought with consequent poor cattle condition, and to a larger demand than had existed previously. The shortage of slaughter cattle has persisted from 1943 to the present time.

Droughts were progressively more serious in early 1944 and in early 1945, and demand has continued to increase. During the latter part of 1945, beef cattle were sufficiently heavy to encourage owners to sell at or slightly below official ceiling prices. Although the marketings were reduced during the late winter and spring of 1946, it is doubtful if last year's critical shortage will recur. A more adequate rainfall has maintained Cuban pastures in better condition than in the two previous fall and spring seasons when the Island was struck by drought.

Numbers

Beginning with the 5-year period 1921-25, Cuban cattle numbers averaged 4.8 million per year. In the subsequent 5-year periods of 1926-30 and 1931-35, cattle numbers showed decreases of more than 7 and 10 percent, respectively, compared with 1921-25. During the period 1936-40, cattle numbers reached an average of 5.0 million per year, or an increase of more than 12 percent over the 1921-25 period. Throughout the period 1927 to 1937, however, Government aid, protective tariffs, improved breeding stocks, and modern packing plants changed Cuba from a heavy importer of beef to a position of self-sufficiency, and even to a net exporter of beef, except for minor importations occasioned by the drought.

The official Cuban livestock census taken in early 1945 enumerated 3,884,158 cattle of all types, but a rounded figure of 4,000,000 is generally accepted. The rounded figure takes into consideration the 3.6 percent underenumeration calculated by the Cuban Ministry of Agriculture. On the basis of the latter figure, cattle numbers declined 25 percent from the previous official count of 5,334,813 head at the beginning of 1941. The decrease that occurred has been attributed to excessive slaughter and prolonged drought. Table 1 gives the cattle population of Cuba on a 5-year average basis from 1921 to 1940 with yearly figures for 1941, 1943, and 1945.

Table 1 - Cattle numbers, averages 1921-25 to 1936-40, annual 1941, 1943, and 1945

Year	:	Number	:	Year	:	Number
	:	Thousands	:		:	Thousands
1921-25	:	4,841	:	1941	:	5,335
1926-30	:	4,496	:	1943	:	4,897
1931-35	:	4,340	:	1945	:	1/ 4,000
1936-40	:	5,024	:		:	

Agricultural Statistics, and Foreign Crops and Markets, U.S.D.A.

<sup>1/</sup> Allowance has been made for underenumeration in the Livestock Census of 1945.

<sup>1/</sup> Minneman, P. G., The Agriculture of Cuba Foreign Agriculture Bulletin No. 2, United States Department of Agriculture, December 1942, pages 109-121.

The 1945 census indicated that 1.3 million head, or 34 percent of the total, were beef stock of 1 to 3 years, being prepared for market. This entire group of beef cattle showed a 25-percent decrease from the 1941 census. The only increase noted in this group was in the 2-year-old animals, which showed an increase of 21 percent. The number of finished 3-year-old was only 367,650, which is an exceptionally small figure, attributed to the excessive slaughter due to heavy demand for beef.

According to the census figures, breeding and dairy cattle represented 2,233,864 head. This was 20 percent below 1941. Out of this group, 769,820 were classified as breeding cows and 495,354 as milk cows. Milk cows alone were 17 percent less than in the earlier census. Many cattle herds, however, are dual-purpose for beef and milk, and the distinction between breeding and milk cows therefore is not specific. Calf numbers were reported at 703,492, or roughly 56 calves for each 100 cows. This appears fairly reasonable, although probably a little high, as the annual calf crop is usually estimated at a little less than 50 percent.

The total also included 265,198 bulls and 333,653 oxen. The latter are strictly work animals, being selected from beef herds on the basis of conformation, strength, and docility. Cattle population by types is given in table 2.

Table 2 - Comparison of cattle population by types, 1941 and 1945

Type of cattle	1941 <u>1/</u>	1945 <u>2/</u>
	<u>Number</u>	<u>Number</u>
<u>Breeding and dairy:</u>		
Bulls	242,811	265,198
Milk cows	594,793	495,354
Other cows	1,041,240	769,820
Calves	919,361	703,492
	<u>2,798,205</u>	<u>2,233,864</u>
<u>Beef stock:</u>		
Yearlings	764,728	541,699
Two-year-olds	337,570	407,292
Three-year-olds	645,608	367,650
	<u>1,747,906</u>	<u>1,316,641</u>
<u>Other:</u>		
Oxen	408,406	333,653
Unclassified	380,296	
	<u>788,702</u>	<u>333,653</u>
Total	<u>5,334,813</u>	<u>3,885,158</u>

Cuban Ministry of Agriculture, Livestock Census of 1941 and of 1945.

- 1/ Census was started in latter part of 1940 and completed in early 1941.  
2/ The Ministry of Agriculture calculates that cattle not enumerated by the 1945 census may be 3.6 percent of these figures, which would increase the total by 141,765 head.



## Land Used for Cattle Production

The total land area of Cuba is considered by the 1945 census to be 860,075 caballerias, or approximately 28.5 million acres. The tabulations indicate that 35 percent of this total land area is being used as cattle pasture and range, and that an additional 18 percent of the land area lies within the boundaries of stock farms.

In proportion to its total land area of only 28 million acres, and its human population of 4,778,583, the Cuban cattle numbers are relatively large. In the Western Hemisphere, the total cattle population is greater only in the United States, Argentina, Brazil, Mexico, Canada, Uruguay, and Colombia.

The principal zone of cattle production is made up of the three eastern Provinces, which reported 79 percent of the total cattle and 74 percent of the total area in stock farms. See table 3 for further detail. The total area of all stock farms in Cuba was reported as equivalent to 15.2 million acres, averaging 240 acres per farm.

Of the total acreage, pasture accounted for 6.5 million or 43 percent, and unimproved range for 3.5 million or 23 percent. The remaining 34 percent (5.2 million acres) was reported to be idle or useless land, including water and mountains. The average number of acres per head of cattle is calculated at 3.9 acres, with 2.6 acres of this being utilized for pasture and range.

Table 3 - Land used for cattle production, by Provinces, 1945

Province	Farms reporting	Total cattle	Average head per farm	Average area per farm	Average area per head	Total land
	Number	Number	Number	Acres	Acres	Acres
Pinar del Rio	6,079	307,509	51	277	3.0	5.5
Habana	12,329	299,826	24	81	2.5	3.3
Matanzas	7,025	319,286	45	329	2.8	4.1
Las Villas	18,018	1,031,209	57	193	2.2	3.4
Camaguey	7,742	1,063,489	137	467	2.5	3.4
Oriente	12,289	862,839	70	337	2.9	4.8
Total	63,482	3,884,158	61	240	2.6	3.9

Cuba: Livestock Census of 1945, Ministry of Agriculture.

The average size of farms, according to the census, ranged from 81 acres and 24 cattle in Habana Province to 467 acres and 137 cattle in Camaguey Province. Large ranches predominate in the eastern Provinces, particularly in Camaguey, while the cattle industry in Habana Province is made up mostly of small herds, including many dairy enterprises.



## Production Practices

The predominant breed of beef cattle is a cross between the native stock (criollo) and the Brahma or Zebu of the Guzerat type. The native cattle are the product of a century or more of indiscriminate crossing of Spanish stock, but the Brahma has been introduced principally during the past 30 years through importation of pure-blood bulls. Usually, the bulls run with the cows a considerable portion of the year, and the herds are typically a mixture of crosses ranging from  $1/8$  to  $7/8$  Brahma.

The Brahma introduction contributed greatly to the improvement of the Cuban cattle industry through tolerance of the breed to heat, and ability to subsist and fatten on range grasses despite the ravages of the tick. Improved breeds, such as Shorthorn, Hereford, Aberdeen Angus, Brown Swiss, and Charolais, have also been introduced, but the wide influence of Brahma is most readily apparent. The Charolais breed was obtained from the French West Indies. The others are imported from the United States. Breeding stock from the United States frequently dies when introduced into Cuba unless it is immunized and acclimated. Consequently, these animals must be acclimated and immunized to tick fever, but this is being accomplished, and there is a noticeable trend toward improvement of the beef herds of the island.

It is estimated that about one-half of the cattle are produced on large ranches and about one-half by small farmers. The cattle are usually sold for slaughter direct from pasture, without and fattening, and without receiving any grain or other feed.

Feed is almost entirely range grass, of which the two most important types are guinea and paraná. Both of these were introduced many years ago and now are common throughout the island. The sub-tropical climate permits cattle to graze throughout the year, but the grass is best during the rainy season and immediately following from May through December. Growing cattle gain 200 to 300 pounds during this season, with gains occasionally being reported as high as 100 pounds per month. During the early spring dry season, pastures frequently are very poor and ranchers consider themselves fortunate if mature cattle hold their weights without loss.

Range land is fenced, and usually cattle are moved from field to field to promote best utilization of the grass. Improved pastures frequently are maintained for fattening market stock, with thickets being cut, and water troughs being provided. In some exceptional cases, cattle receive some supplementary feed of sorghum, sugar cane, or molasses, but this practice is not at all common. The high cost of corn in Cuba relative to cattle prices prevents the feeding of fattening rations based on grain.

The carrying capacity of the native grass pasture and range is relatively high during the rainy season. The census average of 2.6 acres of pasture and 3.9 acres of all land, per head, appears to be typical of conditions in this respect. In the dry season, however, the cattle have difficulty in subsisting on this acreage. A principal problem of the industry is over-crowding of pasture and range whenever spring droughts are severe.

There is considerable specialization among ranchers. Breeders keep cows and raise calves, which are sold as yearlings weighing 350 to 400 pounds. Growers buy yearlings, and sell 2-year olds weighing 600 to 700 pounds. Feeders keep the 2-year-olds for 15 to 24 months, depending on range and market conditions, and sell the finished animals at 1,000 to 1,200 pounds.

Practices in handling cattle vary widely, but typically are rather primitive. Range bulls deteriorate rapidly, as controlled breeding is practiced only to a limited degree. Most calves are dropped in the spring, but some births occur throughout the year. Often the calves are left until they are 6 to 12 months old before being rounded up for branding (or ear-clipping), vaccination, castration of male stock, dehorning, and clipping. Castration at a late age curtails the animals' growth considerably, and causes some death losses. Also, castration is often omitted entirely, or, when performed by pressure instruments, is done only partially. Dehorning is limited to clipping the tips.

Under these circumstances, a large percentage of cattle come to market as large-boned, lean, muscular, wide-horned animals, and producing lean meat without marbling and without fat, which Cuban consumers prefer. Some growers, however, have demonstrated that Cuba can produce fat, grass-fed steers whose meat compares favorably with all but the highest grade of grain-finished steers in the United States.

Disease is not a serious factor. The island is free of foot-and-mouth disease and rinderpest. Strict quarantine regulations bar the importation of fresh meat from infested countries, which might bring these diseases to Cuba. Cattle generally are vaccinated against blackleg and anthrax. Tuberculosis and Bang's disease exist but have not been reported at any time as causing serious losses.

Cattle ticks are common throughout Cuba. Although the cattle develop a relative immunity to tick fever, the vitality and quality of herds are sometimes affected detrimentally. The better ranches dip their cattle regularly, and some have developed pastures fairly free of ticks. The prevalence of ticks is a particularly serious problem for breeding stock imported from tick-free areas of the United States.

#### Marketing and Prices

Weights and condition of cattle are best in September and October, and also the number of finished 3-year and 4-year-olds is greatest at this time. Consequently, there tends to be a seasonal variation in cattle marketings, especially at Habana, with the peak being reached in September and October and the bottom in March and April. This variation has been particularly evident in recent years, because the Government attempted to enforce more or less uniform ceiling prices throughout the year. In 1943, 1944, and 1945, marketings were small in the spring, but cattle were shipped freely in the autumn.

The supply of beef improved somewhat during the early months of 1946 on account of the good rainfall in cattle areas, which permitted owners to market relatively heavy animals. A year ago a prolonged drought seriously affected



pastures, and farmers were unwilling to sell lean animals at the ceiling price. There is a strong demand for meat products by sugar workers during the period of the cane harvest, from February through April.

The principal market movement is about 250,000 head annually from the Camaguey-Oriente area to the Province of Habana, moving by rail over distances varying from 300 to 500 miles. Other marketings are for local use and do not involve long-distance transportation.

Prices for the entire island are based on the market existing in the city of Camaguey, in the Province of Camaguey, 335 miles from Habana. Quotations are made on the basis of Camaguey railroad yards, with premiums for stations nearer Habana and discounts for those more distant. The Habana packers purchase at Camaguey mostly through commission men.

All slaughter cattle are classed in one market grade termed "novillos." There is no calf or yearling-beef quotation for slaughter animals, as such meat is not consumed to any significant extent.

The present ceiling price for live cattle is about 8 cents per pound, basis Camaguey. Because of the large demand relative to supply, the ceiling price has advanced from the 3.2 cents which existed in late 1941 when the war began. The lowest price recorded in recorded in recent years was 2.9 cents in 1938. In 7 years, cattlemen have experienced a price advance of 400 percent.

The Camaguey price since July 1945 has been about 7.9 to 8.0 cents per pound, live weight, for slaughter cattle. A fat steer of 1,000 pounds sells at \$80, which is the highest value in two decades. Feeder cattle reflect these advanced values, with yearlings selling near \$40, and 2-year-olds near \$60 per head. These prices apparently are highly profitable for cattlemen.

Retail ceiling prices for beef, up to the latter part of April 1946, were about 21.6 cents for Grade I, 17.7 cents for Grade II, and 5.9 cents for Grade III. During late April 1946, the ceiling prices were raised to 23.6 cents and 19.7 cents, respectively, for Grade I and Grade II beef (on basis of Spanish pounds, 24 cents and 20 cents, respectively).

Butchers frequently charge as high as 27 to 28 cents a pound, notwithstanding the ceiling price of 23.6 cents for Grade I beef. The wholesale ceiling price for beef carcasses delivered by packers to butchers is 14.5 cents per pound (32 cents per kilogram), amounting to 14.7 cents per Spanish pound. 1/

1/ One Spanish pound equals 1.0143 pounds avoirdupois.



Butchers complain that the margin between the wholesale and retail ceilings is insufficient. Every now and then the Habana butchers go on strike, but the Government has been breaking these strikes by authorizing packers to sell meat from trucks parked strategically throughout the city.

There are no ceiling prices for tenderloin or for liver and other edible organs. Prices of whole tenderloin in recent months have fluctuated between about 70 cents and \$1.00 per pound.

Retail beef prices (official) have risen from 13.8 cents in 1939 to 23.6 (actually about 27 cents now) at present. According to official indices, retail beef prices are 64 percent higher than in 1937, but this advance is much less than that experienced by many other foodstuffs which are 200 to 300 percent higher than in 1937. This is one of the factors accounting for the present large demand, as beef at present prices rank nutritionally among the cheapest foods now being sold in Cuba.

### Packing Industry

Four modern packing plants are established in Habana to slaughter cattle for the city's requirements. Another modern packing plant operates at Camaguey, killing for local use, and for making canned and dried jerked beef. These are the only five cattle-slaughter plants in Cuba equipped with refrigeration and with equipment for utilization of byproducts. The Habana plants have a combined slaughter capacity of approximately 2,000 head per day, which is almost triple the usual Habana kill of some 700 head daily.

Present slaughter facilities are sufficiently adequate to permit killing of cattle for export should surplus stocks become available. This was an important phase of the business from 1940 to 1942.

Commercial slaughter other than in the plants mentioned above is conducted in numerous municipal slaughterhouses, which are simple killing sheds equipped with corrals, hooks, and water, available to butchers on payment of prescribed fees.

Cattle ordinarily are killed by stabbing, with severance of a nerve trunk to cause instant death and little bleeding, resulting in dark-colored meat. The Habana packers, however, began to use the method of stunning and bleeding in 1940 when they shipped beef to the United States, and one packer has continued to kill in this manner.

In all slaughterhouses, cattle are killed during the morning, and supplies are delivered to butcher shops in the same afternoon. The beef is sold to consumers the same day or the next morning. Packers do not store chilled or frozen beef, using their refrigeration equipment only for export purposes or for occasional use in handling surpluses. Butcher shops seldom have boxes holding more than 100 pounds of meat and therefore limit their purchases each day to their immediate requirement. No important stocks of chilled or frozen beef exists at any time, unless there is an export movement.

Some cattle are slaughtered for manufacture of dried jerked beef. This industry is located mostly in rural areas, operating on a small scale with primitive methods. Several of the large packing plants are equipped to can beef, but the only important producer among the packers has been the Camaguey plant.

Trade sources estimate that the annual rate of cattle slaughter in Cuba during the past 5 years has varied between 600,000 and 800,000 head. There is a general consensus of opinion that slaughter in 1944 and 1945 was about 650,000 head annually. The all-time peak of perhaps 800,000 head was reached in 1941. There has been a downward trend in slaughter since 1941, but the rate is difficult to ascertain because cattle slaughter for consumption in Habana has been diverted considerably from the packing houses to small municipal slaughterhouses, as a result of price and labor difficulties experienced by the packers. For example, the Habana packers slaughtered only 103,000 cattle in 1944, whereas in prewar years their annual slaughter was near 250,000. Cattle slaughter and beef production in inspected slaughterhouses is given in table 4.

Table 4. - Cattle slaughter and beef production for domestic consumption, 1939-45 <sup>1/</sup>

Year	Cattle slaughtered	Average live weight	Beef carcass production		
			Total output	Average per head	Beef per capita
			Million Pounds	Pounds	Pounds
	<u>Number</u>	<u>Pounds</u>			
1939	457,659	622	157.1	342	38
1940	481,943	633	168.6	348	29
1941	510,559	668	190.3	368	45
1942	594,397	597	218.3	324	52
1943	519,767	681	185.2	357	39
1944	443,683	732	168.2	379	35
1945	542,954	719	203.9	376	42

Cuban Ministry of Agriculture

<sup>1/</sup> These data are incomplete, as much slaughter is not reported officially.

The Ministry acknowledges that these data may be incomplete by 200,000 to 250,000 head, which confirms the estimate of an average kill close to 700,000 head per year. Partial data on cattle-hide production also confirm the latter figure. The slaughter series of the Ministry appear fairly accurate in their indication of an all-time slaughter peak in 1941 and 1942, and a decline thereafter.

All estimates of cattle numbers and slaughter agree that the annual slaughter rate is 15 to 16 percent of the total numbers. This low percentage is caused by the advanced age of 3 and 4 years at which cattle are marketed. Better breeds, feeding, and herd management to enable the finishing and slaughter of younger cattle, so that 20 percent of the cattle numbers could be slaughtered each year, could increase Cuba's beef output by 20 to 25 percent.



### Beef Output and Consumption

Ordinarily a finished steer, 3 to 4 years old and weighing 1,000 pounds, yields a dressed beef carcass of about 564 pounds, including approximately 51 pounds of bones. Other meat, including edible organs, will weigh approximately 29 pounds. The remainder of the animal is made up of the following inedible products: 1/

<u>Product</u>	<u>Pounds</u>
Hide	70
Tallow	65
Blood	65
Digestive organs and contents	130
Lungs	8
Feet, hoofs, skull	38
Other and losses	<u>31</u>
Total	407

Many cattle are slaughtered weighing only 700 to 800 pounds, making the average yield for all slaughter probably about 375 pounds per head. The estimated slaughter rate in 1944 and 1945, on this basis, would supply about 270 million pounds of beef annually. This is equivalent to a per capita supply of 55 pounds, not including liver and other edible organs.

The slaughter in recent years has not met the demand, which is estimated at 70 pounds per capita, or a total of about 350 million pounds annually. Slaughter of some 850,000 head per year would be needed to supply this quantity of beef.

As mentioned previously, Cuban preference is for heavy, dark, lean beef, with little marbling and with no fat. There is no grading of carcasses, but on United States Standards the bulk of the output would be classed as Utility. Growers have demonstrated an ability to produce grass-fed steers whose beef compares favorably with United States standards for Commercial and Good, but the trade ordinarily pays no premium for fat young stock. Consequently there is little incentive for such production. 2/

At retail, the beef cuts are classed in three grades. The best grade includes loin, round, ribs, and chuck; the second grade is mostly neck, shank, and flank; and the third is top loin, trimmings, and bone. These grades, however, have been generally disregarded during the periods of meat scarcity in the past several years.

1/ Revista Ganaderos, February 1943.

2/ When the United States Commercial Company purchased Cuban beef in 1943-44, inspectors of the United States Department of Agriculture graded about 80 percent Utility and 20 percent Commercial. The packers had made a special effort to obtain fat young cattle.



## Byproducts

Tallow and hides are the principal byproducts from Cuban cattle slaughter. Also, substantial quantities of cattle hair, bones and tankage are shipped to the United States, and pharmaceuticals are made from the glands in laboratories at Habana.

Theoretically, the slaughter of cattle should yield an average of at least 40 pounds of tallow per head, or 26 million pounds from the currently estimated slaughter of 650,000 head. Actually, the visible tallow production is only about 8 million pounds per year. The wide difference is explained by the preponderance of country slaughter at plants not equipped for rendering, negligible trimming of meat, poor cattle condition resulting from drought, immediate disappearance into local edible use because of the war-time shortage of imported lard, and diversion to black-market soap manufacture. Even before the war, visible tallow production was confined largely to the Habana packing plants, reaching an estimated peak of 15 million pounds in 1941. All domestic tallow is used in Cuba, as the island is deficient in both animal and vegetable fats and oils, and large quantities are imported annually for edible and industrial use.

Cuban production of tallow in 1945 was probably only about 8 million pounds compared with an estimated 10 million pounds during the previous year. The reduced figure is attributed to the smaller number of animals available for slaughter resulting from the 5-year decline in cattle numbers. The drought sharply curtailed feed supply, and many slaughtered animals were very thin with little tallow on their carcasses. Furthermore, a much smaller proportion of slaughtering than normal was done in the large slaughterhouses of Habana, from which tallow production is distributed to the soap makers under supervision of the Cuban Office of Price Regulation and Supply (ORPA). Much of the beef produced by the small abattoirs was poorly trimmed to provide cooking fat as a result of scarcity, and therefore the recovery of industrial tallow was reduced.

Hides and skins, because of their importance, are treated separately on page 23.

## Foreign Trade

Cuba is considered to be self-sufficient with respect to cattle and beef. From 1936 to early 1942, there was a small export surplus, reaching a maximum in 1941 when exports were 43 million pounds of beef and 9,974 head of cattle. An export embargo was declared in 1942, however; since then there have been recurring shortages even for the domestic market. The export ban has been lifted for short periods to permit war emergency shipments, but still exists and is likely to be maintained for at least several years. 1/

The cattle industry enjoys a highly protective duty of \$12 per 100 kilograms on fresh beef imported from the United States. Quarantine regulations, as well as a duty of \$15 per 100 kilograms, prevent the importation of Argentine beef. It is unlikely, therefore, that fresh beef will be imported to relieve shortages in Cuba, even if supplies become available soon in the United States.

1/ In 1943-44, the USCC was permitted to export certain quantities of beef and cattle, and in October 1945 the French Government was given permission to purchase 400 cattle to relieve a food shortage in Martinique.

## Outlook

Indications are that the decline in cattle numbers between 1940 and 1945 is a temporary fluctuation, not the beginning of a downward trend. Factors causing the decline have been exceptional demand, drought, and numerous alternative opportunities for employment of land, labor, and capital. During the next 5 to 10 years, more favorable economic factors and better weather are likely to cause a restoration of cattle numbers to at least the 1940 level. Also, improvement in cattle breeding, feeding, and care may enable reduction in the average age of slaughter, thereby increasing the annual output of beef from the available cattle.

## Breeders Associations

The principal Livestock Organizations and Association in Cuba are as follows:

Corporación Ganadera de Cuba, Edificio Metropolitana 829, Habana, (Cattlemen's Association for principal livestock raisers, about 30 members).

Asociación Nacional de Ganaderos de Cuba, Malecon 107, Habana, (National Cattlemen's Association, about 40,000 members).

Asociación de Defensa Nacional de Vaqueros, (Attention: Sr. Francisco del Calvo), Calzada de Luyano 438, Habana, (Dairymen's Association of Cuba).

This office maintains a list of livestock breeders and producers. This list includes the principal breeders of purebred cattle. These breeders are also large-scale producers of mixed-blood beef and dairy cattle. Names of these breeders can be obtained on written request to the United States Department of Agriculture.

## Government Policy

As a basic policy, the Cuban Government endeavors actively to encourage the development of the cattle industry, and to assure consumers an adequate supply of beef at low prices. Many regulations have been promulgated with respect to practices, slaughter, and prices. During the past 3 years, scarcely a month has passed without a new decree or resolution on these subjects.

Existing regulations of particular economic importance are: (1) Exportation of cattle, beef or beef products is prohibited. Exceptions are made only for small numbers of cattle purchased by the United States Commercial Company or by the French Government to supply emergency needs in the Caribbean Islands, and for sales of breeding stock to countries in the Caribbean area. The most recent authorization permitted the export of a small number of live cattle for breeding stock, including 300 to Venezuela and some to Yucatán. (2) Ceiling prices exist for live cattle and for beef. When economic conditions favor higher prices, however, there is practically no enforcement except on the large Habana packers. (3) Slaughter of bulls is periodically prohibited. Enforcement of this regulation likewise is limited to Habana packers. A renewal of enforcement on October 1, 1945, greatly reduced beef supplies at Habana, as slaughter cattle now being marketed are mostly bulls.



Many other regulations have been promulgated by the Cuban Government in an attempt to relieve the recurrent shortages of beef at Habana, but these are in suspension or have been repealed. Such measures included (1) a quota system limiting the daily kill at each slaughterhouse, (2) beefless days on Tuesday and Friday, (3) prohibition of cattle movement without permits, (4) subsidies to cattlemen in order to avoid price increases, (5) quota limitations for manufacturers of jerked or other processed beef, and (6) establishment of a combined purchasing commission to buy cattle for all slaughterhouses in the Habana area. The principal result of each of these measures was a diversion of cattle to slaughter outside the city of Habana, and they intensified rather than alleviated the Habana beef shortage.

Government promotion of the cattle industry in its technical aspect is the function of an animal industries section within the Ministry of Agriculture. The most active work of this nature, however, is conducted by a national association of cattlemen (Asociación Nacional de Ganaderos de Cuba). This association distributes numerous informational circulars to its members, and publishes monthly a magazine, the Revista Ganadera, of considerable value to cattlemen.

Governmental measures enacted during the first quarter of 1946, to regulate the marketing and slaughter of cattle are as follows:

(1) The Cuban Government will permit the importation of 800 tons of jerked beef from Uruguay under the terms of a barter agreement which was arranged last year. The price is understood to be 80 Uruguayan pesos per 100 kilograms or about \$50.00 (22.65 cents per pound) f.o.b. Montevideo. 1/

(2) The slaughter tax of \$0.50 per head on steers and \$1.50 per head on bulls is to be used to build up a fund to furnish unemployment benefits to slaughterhouse workers. The Government in January 1946 agreed to advance credit of approximately \$30,000 to Matadero Industrial, for payment of back wages to its workers. 2/

(3) A Government order to increase wages of packing house employees has caused managers of all but one of the plants to threaten to suspend operations. (The plant excepted is already paying wages at the required scale.) The Government is not likely to assume operation of packing houses in view of its difficulties in managing the Matadero Industrial.

1/ Customs duties are to be waived. The right of importation has been granted to a local company, who will pay duties of 18 cents per pound compared with the general tariff rate of \$20.00 per 220.46 pounds (100 kilos).

2/ The Matadero Industrial, Habana's largest slaughterhouse, was seized by the Government on account of labor troubles on September 19, 1945.



(4) Habana packers and their employees have been demanding reimposition of the requirement that all beef for Habana be prepared by the regular packing houses. This would forbid the sale in the city of the product of abattoirs of nearby towns, much of which has been sold at high, black-market prices. The mayors of the municipalities affected have now petitioned the President to continue to permit sale of their beef in Habana.

(5) The retail butchers of Habana had a number of strikes on account of the allegedly small profit margin permitted by the ORPA. As in the case of previous meat strikes, the Government arranged to distribute packaged beef from trucks and the butchers finally went back to work. The better supply of dressed beef at somewhat below the ceiling price was probably also a factor in the settlement of this dispute.

(6) The Government in April agreed, at the instance of butchers, to raise official meat retail prices from about 21.6 to 23.6 cents a pound and 17.7 to 19.7 cents a pound, for first and second class meat, respectively, and has indicated it will consider establishing minimum wages of butcher-shop employees at \$60 per month. 1/

(7) A decree has been published providing for a new census of Cuban agriculture and livestock. A census of the livestock in Cuba was taken by the Army in 1945.

### Hogs

#### General Situation

Hog production in Cuba is a minor enterprise and the output is fairly stable from year to year. The annual slaughter is sufficient to meet all of the fresh-pork requirements and most of the salt-pork requirements, but the output of lard is negligible compared to consumption, and Cuba is a heavy importer from the United States. With improved breeds, and better feeding practices, Cuban hog production might be developed sufficiently to fill all domestic demands for fresh and salt pork, but there is no possibility for enlarging lard production to a significant extent. The warm climate, and absence of a major feed crop, limit hog production economically to the meat requirements of the island, and this scale of production scarcely begins to meet the lard requirement.

#### Numbers

The 1945 census enumerated 669,373 hogs, which was a reduction of 22 percent from the official count of 856,754 at the end of 1940. Both enumerations, however, are regarded as inaccurate, and the Ministry itself calculates that the 1945 census may be too low by 14.4 percent. Informed observers estimate that actual hog numbers are 900,000 to 1,000,000 head, and that this population has been fairly stable during the past decade. Numbers of hogs for 1941 and 1945, by Provinces, are given in table 5.

1/ Ceiling price of cattle on the hoof has not been changed, and slaughterhouses are still required to sell meat to retailers at about 14.5 cents per pound (32 cents per kilo).

Table 5. - Number of hogs, by Provinces, 1941 and 1945

Province	1941	1945
	<u>Number</u>	<u>Number</u>
Pinar del Rio	157,676	93,684
Habana	116,442	105,906
Matanzas	79,644	64,481
Las Villas	270,077	211,230
Camaguey	136,046	97,537
Oriente	<u>96,869</u>	<u>91,535</u>
Total	856,754	669,373

Ministry of Agriculture, Livestock Census of 1945.

NOTE: The census reports that the 1945 hog enumeration may be too low by approximately 14.4 percent, with the error ranging from 10 percent in Las Villas and Camaguey to 25 percent in Matanzas. A commensurate increase would bring the total enumeration to 765,227 head.

#### Production Practices

The common type of hog in Cuba is known as the "criollo." This is a mixture of various breeds, which has degenerated in the warm climate into a rangy, meat animal with a dark gray skin almost devoid of bristles. The usual practice among the better hog producers is to cross imported purebred boars, usually Hampshire, with the native sows, taking advantage of the native resistance to the warm climate while improving the market quality of the pigs.

The typical enterprise is small, with few growers having more than 10 sows. The sows are bred to farrow in the spring and fall, with the latter crop usually being the largest. The number of pigs saved per sow ordinarily is low, probably averaging about five.

Feed is the principal limiting factor in Cuban hog production. Costs for domestic corn, imported grains, and domestic or imported protein meals are almost always too high relative to hog prices to permit fattening on such rations. The hogs subsist on pasture, roots, pumpkin, and palmiche nuts. The latter are seed clusters of the royal palm which are harvested or allowed to fall on the ground for hog feed. The nuts are oily and if fed alone tend to produce soft pork, but usually the other feeds offset this factor.

Growth of hogs is much slower than in the United States. Some growers are able to produce a 200-pound animal in 8 to 12 months, but typically a hog of this type requires 12 to 16 months. The Cuban growers are more attentive to current prices than to weights, and market their stock at between 150 and 275 pounds, depending on existing prices and their ideas concerning future prices.

Cholera and other common hog diseases are prevalent in Cuba, but epidemics are rare, presumably because of the small-scale and scattered nature of production. The larger commercial growers customarily vaccinate their herds.



## Marketing and Prices

Three types of demand exist in the Cuban hog market. The most important at present is the demand for fresh pork from good meat hogs of 150 to 250 pounds. In second place is the packer requirement for similar hogs to produce salt fat pork, salt pork, and cured hams. Finally, there is a large demand for pigs of 2 to 4 months, used for roast pig (lechón asado), which is a traditional Cuban dish on special occasions. Marketings of the latter are particularly large during the Christmas holiday season.

For mature hogs, there is only a moderate seasonal variation in marketing, with the peak usually occurring in autumn. The absence of an accentuated variation results from the slow growth, with mature slaughter stock being available at any time during the year.

Most hogs are slaughtered locally in small lots. There is no central hog market such as exists for cattle. 1/ The packing plants at Habana are killing very few hogs at present, as ceiling prices, enforced intermittently on them, prevent their operation in competition with prevalent slaughter at black-market prices.

Prices now range from about 17 to 23 cents per pound for live hogs weighing 150 to 275 pounds. Prices were only about 7 to 9 cents per pound in 1940 but have advanced steadily during the past 5 years. The Office of Price Regulation and Supply occasionally attempts to enforce a ceiling price of 14 cents on the Habana packers, but this merely prevents their operation, as slaughterers on the outskirts of Habana pay the higher prices.

Retail ceiling prices remain at 33.5 cents a pound for fresh pork and 27.6 cents for salt pork, but actual prices are nearer 44.4 cents a pound for fresh pork and 34.5 cents for salt pork. Ham prices are very high, averaging about 98.6 cents per pound at retail. Bacon sells at about 78.8 cents.

Refined lard in bulk, has a wholesale ceiling price of 21.6 cents per pound, and a retail ceiling of about 24.6 cents. Actual prices have been about 3 cents higher in most commercial outlets, but due to scarcities reached 40 cents in mid-1946. Profits in the lard trade are large for importers who are able to obtain shipments from the United States. Total costs for lard after refining are reported between about 17.7 and 18.7 cents per pound.

An exceptional price relationship exists in Cuba between hogs and cattle. The price of hogs normally is double, and sometimes triple, the price of cattle. This reflects mostly the difference in costs of production. Cattle are well situated in Cuba with respect to feed and to the climate, but these factors are not favorable to hog production.

1/ In addition to some hog slaughter at the cattle packing plants at Habana and Camaguey, Swift and Company has two slaughter plants, one at Habana and the other at Santiago de Cuba, devoted exclusively to slaughter of hogs and preparation of salted and cured pork.



## Pork and Lard Production

Slaughter of mature hogs is believed to be approximately 300,000 annually. In addition, it is likely that 200,000 suckling or young pigs are killed, mostly by local butchers or directly by consumers.

Hogs and all major pork products are still in very short supply; however, good winter crops of malanga, yucca, pumpkins, corn, and other products used as hog feed may result in somewhat more pork during the next few months. Strong demand will probably prevent any marked lowering of prices.

The Ministry of Agriculture has published a hog-slaughter estimate of 131,232 for 1944, but its data include only the kill reported by the packing plants. The Ministry data indicate a pronounced decline in hog slaughter since 1942, but this represents instead a growing diversion of hogs to country slaughter. The estimates of the Ministry appear reasonable, however, with respect to the average live weight at 170-180 pounds, and the average dressed meat carcass of 115-125 pounds. The most recent available data concerning hog slaughter and pork production are given in table 6.

Table 6-Hog slaughter and pork production in packing plants, 1939-1945

Year	Hogs	Average	Dressed carcasses	
	slaughtered	live weight	Total	Average weight per head
	<u>Number</u>	<u>Pounds</u>	<u>Million</u> <u>pounds</u>	<u>Pounds</u>
1939	218,153	172	26.4	121
1940	229,256	174	27.9	121
1941	209,689	183	26.9	128
1942	212,578	168	24.9	117
1943	180,544	174	20.8	117
1944	131,232	174	14.9	115
1945	122,791	166	13.8	113

Cuban Ministry of Agriculture. These data in recent years are believed to include only about half the total slaughter.

Trade sources report that slaughter hogs this year have averaged 180 pounds, live weight, yielding 125 pounds of meat and 15 pounds of leaf lard. There is practically no production of rendered pork fat, as all fat pork except the leaf lard is being sold as meat.

Assuming these yields and a slaughter of 300,000 mature hogs, the apparent pork production is 37.5 million pounds annually. About 20 million pounds of this total probably is consumed as fresh pork, with the balance being processed mostly for salt pork.

The annual output of leaf lard appears on this basis to be 4.5 million pounds. About half of this, however, is salted and cured in the same manner as fatbacks and is sold as salt fat pork. The visible production of lard is only 2 to 3 million pounds per year, much of which is used within the packing plants as a sausage ingredient.

Production of lard, including leaf lard, in Cuba during 1945 probably remained at the normal figure of about 6 million pounds. The drought-reduced feed supplies for hogs, but the high prices obtainable for pork and lard encouraged production. As in the case of tallow, lard production was further limited because the bulk of the hog slaughtering was done on a small scale to avoid Government control. Only about 1.5 million pounds of domestic lard was distributed through normal established dealers compared with 2.0 million pounds in 1944.

#### Consumption of Pork and Lard

Cuban consumption of pork during the past decade varied between 40 and 50 million pounds annually, according to estimates by the trade. Domestic production has been short of consumption by 5 to 15 million pounds, which is made up by importation of salt pork and hams from the United States. In 1945, the importers were unable to obtain their requirements because of short supplies in the United States. Consumption this year probably will not pass 45 million pounds, although an exceptional demand exists, which would absorb at least 60 million pounds.

Lard consumption has ranged in recent years from 50 million pounds to 90 million pounds. Domestic production is negligible compared with this consumption. Requirements are filled by heavy importation from the United States. The United States allocation to Cuba for 1945 was 60 million pounds, although the demand was at a rate of 85 million pounds. In 1945, however, Cuba consumed about 13.5 million pounds or 16 percent less lard than in 1944.

There are no important stocks in Cuba of either salt pork or lard. A serious shortage exists, and current production and importation of these products move to consumers without delay. Stocks of lard declined 1.4 million pounds during 1945, leaving 9.4 million pounds on hand December 31. Desirable stocks are considered to be at least 3 million pounds of salt pork and 15 million pounds of lard.

#### Foreign Trade

In prewar years, Cuba imported an average of 5 million pounds of salt pork annually, to supplement the domestic production of about 37.5 million pounds. Because of the beef shortage after 1942, demand for imported salt pork has increased greatly, and receipts in 1944 were almost 12 million pounds. All importations have been from the United States.

Supplies in the United States during 1945 were short, and the importers were unable to fill their requirements, which continued at an annual rate of at least 12 million pounds. Total receipts for 1945 were only 5.2 million pounds. In order to obtain even this quantity, the importers purchased almost any cut of pork, instead of confining their purchases to bellies as is their usual practice.

Importation of dry salt pork ordinarily consists of bellies. At present, however, the importers are anxious to buy any cut because of the shortage which exists.



Lard importation is one of the principal items in Cuba's foreign trade. In the prewar years 1937-41, the average annual receipts were 54 million pounds, all from the United States. Demand has increased greatly because of war-expanded purchasing power, and in 1943, the receipts were near an all-time record at 79.5 million pounds. United States shipments in 1943 were only 51 million pounds, but Argentina was a large shipper to Cuba (for the first and only time), and this enabled the exceptional importation.

In 1944 and in 1945, United States allocations of lard to Cuba were 60 million pounds, with provision for reduction according to quantities imported from other sources. Actual receipts in 1944 were 66 million pounds. During 1945, Cuba experienced much difficulty in purchasing lard in the United States. Receipts for the year were about 61.5 million pounds of lard, all of United States origin except for 218,000 pounds from Canada.

Most lard receipts are prime steam in tank cars, for refining and packing at Habana. Imports of refined lard in tierces or drums are made by small importers, but costs are high relative to the economical tank car shipment, which is possible between the United States and Cuba.

Table 7-Importations of pork and products, 1/  
average 1936-40, annual 1941-45

PRODUCT	Average 1936 - 40:	1941	1942	1943	1944 <u>2/</u>	1945 <u>2/</u>
	Pounds	Pounds	Pounds	Pounds	Pounds	Pounds
Fresh pork	67,569	44	0	0	403	11
Salted pork	3,036,837	2,100,322	776,767	749,696	11,456,290	5,221,602
Bacon	1,912,671	1,016,440	2,578,357	661,501	11,385	3,975
Ham	326,042	180,835	284,177	234,563	512,589	587,327
Lard (pure)	46,999,147	65,605,089	62,492,138	79,662,917	66,305,192	61,514,530
Total	52,342,266	68,902,730	66,131,439	81,308,677	78,285,859	67,327,445

Tariff duties are less on salt pork and lard than on any other meat or edible animal fat, amounting to \$9.00 per 100 kilograms for pork and \$3.20 per 100 kilograms for lard, when imported from the United States. These rates represent a 20-percent reduction from the general tariff applicable against receipts from other countries.

1/ Comercio Exterior de Republica de Cuba.

2/ Based on reports submitted by American Embassy, Habana, Cuba.

## Outlook

Hog numbers, and the annual rate of slaughter, probably will remain near their present levels in the next few years. The present high prices provide an incentive for greater production, but the small-scale nature of the hog enterprises and the absence of a feed crop prevent any substantial increase in numbers.

Technically it appears possible that Cuba could increase hog slaughter by about 100,000 head per year, through stock improvement and through better utilization of the available feed in a manner designed to fatten hogs to marketable weights in 8 to 12 months. Such an increase in slaughter would eliminate Cuba's requirement for importation of pork. Lard imports, however, would be affected very little by such an increase, as little lard is rendered from hogs in Cuba. Production of lard may slightly exceed the low output of 1945. Present prospects are that Cuba will desire to import in 1946 at least 10 million pounds of salt pork, and 80 million pounds of lard.

## Sheep and Goats

Flocks of sheep are kept on a small scale on range lands that are too poor to support cattle. According to the 1945 census, sheep numbers are 114,386, but it is likely that the actual number is considerably larger. The sheep have degenerated in the warm climate and are poor quality, producing no commercial wool, being kept only for their production of lamb and mutton.

Goats are common in Cuba, and their number probably is much more than the 84,654 enumerated in the 1945 census. Milk goats are kept both in urban and rural areas, living on whatever feed they can find. Frequently, the kids are slaughtered and sold as lamb.

Table 8-Number of sheep and goats, by Province, 1945

Province	Sheep		Goats
	1940-41 <u>Number</u>	1945 <u>Number</u>	1945 <u>Number</u>
Pinar del Rio	26,116	21,593	3,247
Habana	7,705	8,817	3,523
Matanzas	13,277	7,820	5,131
Las Villas	47,398	33,869	55,738
Camaguey	31,369	29,138	4,497
Oriente	15,569	13,149	12,513
Total	141,434	114,386	84,654

## Livestock Census of 1945.

On the basis of incomplete reports, the Ministry of Agriculture has compiled a slaughter figure for 1944 of 28,071 sheep and goats, producing 800,000 pounds of meat. Actual slaughter probably was twice as much, producing perhaps 2,000,000 pounds of meat.



Table 9-Slaughter of sheep and goats, 1939-45

Year	Animals	Average	Dressed carcasses	
	slaughtered	live weight	Total	Average weight per head
	<u>Number</u>	<u>Pounds</u>	<u>Million pounds</u>	<u>Pounds</u>
1939	28,275	40	0.8	29
1940	27,624	40	0.8	29
1941	23,551	57	0.9	40
1942	32,076	40	0.9	29
1943	25,161	53	0.8	31
1944	28,071	53	0.8	29
1945	21,251	59	0.6	30

Cuban Ministry of Agriculture. These data are believed to include less than half the total slaughter.

The quality of Cuban sheep and goat meat is poor, and frequently there is little of value except the leg roasts. Prices for live animals fluctuate widely according to quality. As there is considerable demand at present for all types of meat, sheep and kids suitable for slaughter are selling at 10 to 14 cents per pound, with retail prices running as high as 60 cents per pound for a good leg of lamb.

#### Hides and Skins

Prior to the war exports of hides and skins amounted to about 250,000 green salted hides annually, valued at 1 to 2 million dollars, with more than two-thirds going to Germany. These were the heavy packer hides produced at Habana. The remaining 500,000 country hides of lighter weight were used in Cuba. Since the beginning of the war, these exports have averaged approximately 1.3 million dollars per year, going principally to the United States. Cuban exports consist principally of wet-salted hides. An unusually strong demand for hides and skins developed during the war years, due to the larger public purchasing power and the increased consumption of leather goods in Cuba, increased exports of shoes and leather goods to the Caribbean area, increased sales of leather to the United States Army and for other purposes, and limited supplies of imported leather. Consequently, because of these tendencies, future exports may reach lower levels.

Commercial cattle hides consist of two types, the Havana Packer, a heavier and better grade, produced principally by the larger slaughterhouses in Habana, and the Slaughterhouse grade which includes all others. Hides of the Havana Packer grade, normally weigh from 65 to 70 pounds, are uniform and are free from disfiguration, coming from animals weighing 1000 to 1200 pounds. These hides are all short shanks, but are not trimmed for ears and snout. Production of export hides centers around Habana, where it averages 250,000 to 300,000 hides per year. Lighter weight and lower quality hides are used in domestic tanning, and the heavy packer hides are exported. During the war there was a pronounced growth of the local tanning and shoe industries.

Cuban prices have exceeded by 3 to 5 cents per pound the 10.67 cents Habana equivalent of the United States ceiling; however, prices have dropped in the past few months, and export sales are being reported at the United States price. Since Cuban prices for both hides and leather are higher than ceilings in the United States for similar qualities, and, moreover, wet green salted hides are subject to Cuban export taxes of one-half cent per pound and an additional 1 cent per kilogram, exports (other than United States Army purchases) to that market have been at a minimum.

Normally, Cuba imports substantial quantities of cured hides from the United States. These imports consist principally of hides and skins (unmanufactured), calf, kangaroo, horse, sheep, goat, kid, and morocco used by the shoe and leather industries. Also, negligible quantities of unclassified hides and skins are imported.

In 1939, 1941, and 1943 the United States supplied from 48 to 81 percent of all hides and skins (unmanufactured) imported by Cuba. Although the United States furnished from 26 to 41 percent of the imports in 1940, 1942, and 1944, the greater portion of imports during these years came from the Dominican Republic, Argentina, and Colombia, respectively.

Of the calf and horse hides imported, the United States furnished 75 to 94 percent during the 1939-44 period. Similarly, with regard to sheepskin importations, the United States provided 74 to 99 percent, except in 1944 when Argentina supplied 68 percent. For the 1939-44 period, the United States supplied from 86 to 99 percent of all goat, kid, calf and morocco skins imported into Cuba. The total imports varied from approximately \$910,421 to \$1,739,374 per year. Production, exports, and imports of Cuban hides and skins are given in Table 10.

Table 10-Production and trade in hides and skins, 1939-44

Year	Production:	Exports	Imports			
	Hides and skins	Cattle hides (salted)	Hides and skins (unmanu- factured)	Calf, kang., and horse hides	Sheepskins (tanned or processed)	Goat, kid, calf and morocco
	Pieces	pounds	pounds	pounds	pounds	pounds
1939	-	11,614	862	500	295	102
1940	1/502,000	11,682	417	329	204	80
1941	1/274,000	18,982	260	286	289	118
1942	-	14,974	55	289	290	211
1943	-	10,695	79	170	421	108
1944	2/700,000	-	216	171	665	87
	:	:	:	:	:	:

1/ Estimated.

2/ Estimated between 650,000 and 700,000.



Scarcity of fine leathers has brought about a revision of tanning methods, resulting in better leather being produced than was the case before the war. Cuba will not be able to produce leather which can compare in type with calf and kid upper leathers, however, unless slaughter practices make hides available from younger animals. The only countries from which unprocessed cattle hides and skins may be imported are the United States and Mexico, since sanitary regulations exclude their importation from countries where foot and mouth disease is prevalent. Imports of unprocessed hides from countries other than the United States and Mexico shown in statistics are probably partially processed or passed by customs under special rulings.

